



Clone a Permit

The Clone Permit feature is used to quickly replicate permits with similar information.

When to use the Clone Permit feature:

- New Residential Construction of Same-As model
- Multi-family Construction
- Commercial Projects with several buildings on one parcel

The benefits of this feature are less data entry, efficiency and reduces errors!

To clone an active permit the active existing permit must be from the current and most up to date addition of the “Create Permit” template.

Once that template changes the older versions are “Archived” which makes them unusable for future permits.

Quick Search

Permit Number **Street Address**

Jun 23, 2019 Jun 23, 2019 All Dates

From Date **To Date**

Permit Number	Street Address	Type	Assignee	Status	Issued Date
19JT-00001	237 WYSS ST JOHNSTOWN JOHNSTOWN	Furnace		Archived	2019-Jan-08
19JT-00002	266 BITTERN DR JOHNSTOWN JOHNSTOWN	Re-Roof		Submitted	2019-Jan-02



The Clone Permit button is located on the Edit Values tab within a permit.

Archived template: Notice the words on the Clone Permit button Clone Permit are muted. This permit cannot be cloned because the permit template is no longer usable.



What is a permit template? It is the pre-formatted data entry file we use to create a permit record in CASCADe. When we make a change to that template (i.e.: add, change, or remove data fields or upload new fee scheduled) previous versions of the permit template are no longer valid and therefore, cannot be used to clone a permit.

The screenshot shows the CASCADe interface for a permit record. At the top, there are tabs for 'View Jurisdiction', 'Addresses', 'Permits', 'Payment Methods', and 'Reporting'. Below these, the permit details are displayed: 'JOHNSTOWN - Permits - 19JT-00095', 'New Single-Family Detached - 3654 TEAKWOOD LN, JOHNSTOWN, 805340000', and 'Permit will expire on 12/18/2019'. A row of tabs includes 'Edit Values', 'Information', 'Issue Permit', 'Required Inspections', 'Schedule Inspections', 'Apply Fees', 'Fee Payments', and 'Workflow Steps'. Below the tabs is a row of buttons: 'Save', 'Withdraw', 'Void', 'Archive', 'Clone Permit', 'Back', 'Print Permit', and 'Print Custom Reports'. A red arrow points to the 'Clone Permit' button, which is highlighted in yellow.

Hover the cursor over the button. Note the message in the text box:

Unable to clone a permit which type is already archived.

This screenshot shows the same interface as the previous one, but with a tooltip message appearing over the 'Clone Permit' button. The tooltip text reads: 'Unable to clone a permit which type is already archived.' A red arrow points to the 'Clone Permit' button.



Active Permit Template: Notice that the words Clone Permit are NOT muted.

The screenshot shows a web interface for permit management. At the top, there are tabs for 'View Jurisdiction', 'Addresses', 'Permits', 'Payment Methods', and 'Reporting'. Below the tabs, the current permit is identified as 'Town of Johnstown - Permits - 19JT-00002' with the address 'Re-Roof - 266 BITTERN DR JOHNSTOWN, JOHNSTOWN'. A note states 'Permit will expire on 8/4/2019'. A secondary navigation bar includes 'Edit Values', 'Information', 'Required Inspections', 'Schedule Inspections', 'Apply Fees', 'Fee Payments', and 'Issue Permit'. Below this is a 'Workflow Steps' section with buttons for 'Save', 'Withdraw', 'Void', 'Archive', 'Clone Permit', 'Back', 'Print Permit', and 'Print Custom Reports'. A red arrow points to the 'Clone Permit' button.

The Clone Permit form automatically lists the permit to be cloned and jurisdiction.

Enter the New Address form the application. If the address does not exist go to the Addresses Tab in the

NOTE: The only time you will click on the [+Create New](#) button is when you will be entering a completely new property including the parcel number.

The 'Clone Permit' form contains the following fields and annotations:

- Permit To Clone:** 19JT-00010. Annotation: "This is the permit number to be cloned."
- Jurisdiction:** Town of Johnstown. Annotation: "The Jurisdiction will populate automatically."
- Parcel:** Search by PARCEL NUMBER or ADDRESS here. Annotation: "Search by PARCEL NUMBER or ADDRESS here."
- Address:** (Inactive field). Annotation: "Address will be an inactive block until a property is selected in the Parcel block."
- Applicant:** Select an Applicant. Annotation: "Select an Applicant."
- Buttons:** Save, Back, +Create New. Annotation: "Click **SAVE** when this form is complete to create a new"



NOTE: Saving a cloned permit form without updating the Parcel/Address block first will result in assigning the new address to the incorrect Parcel Number.



7 EASY STEPS TO CLONING A PERMIT


Step 1 – Identify the permit to be cloned. Next Click the **Clone Permit** button on the **Edit Values** tab.



Step 2 – Identify the **Parcel Number** *or* **Address** of the construction site. Enter the Parcel Number or Address in the **Parcel** block.

A form titled 'Parcel' with a text input field containing '4321' and a blue '+Create New' button below it.

Parcel Number	Address	City	Zip	Township
106102002003	4321 REDROCK LN JOHNSTOWN	JOHNSTOWN	null	4
0961313004321	4321 Main Street	Johnstown	80645	null

Step 3 – To select a property use the cursor to click on the property or use the down-arrow  and the strike the **ENTER** key.

Parcel Number	Address	City	Zip	Township
106102002003	4321 REDROCK LN JOHNSTOWN	JOHNSTOWN	null	4
0961313004321	4321 Main Street	Johnstown	80645	null



NOTE: Saving a cloned permit form without updating the Parcel/Address block first will result in assigning the new address to the incorrect Parcel Number.



Step 4 - The Address block will become **ACTIVE**. Select the block to find the down arrow on the address block to view and select one of the addresses associated with the Parcel number.

The screenshot shows a web interface for managing parcel information. At the top, there is a "Parcel" section with a text input field containing the number "0961313004321" and a blue "+Create New" button. Below this is the "Address" section, which is currently inactive. It features a dropdown menu with a small downward arrow on its right side, which is highlighted by a large red arrow. Below the dropdown is a table with three columns: "Address", "City", and "Zip". The table contains two rows of data:

Address	City	Zip
4321 Main Street	Johnstown	80645
4321 Main St Unit B	Johnstown	80534

At the bottom of the address section, there is a blue "+Create New" button, a "Save" button, and a "Back" button.

Step 5 – Select an Existing or Create a New Applicant

The screenshot shows a dropdown menu for selecting an applicant. The menu is open, displaying a search bar with a magnifying glass icon and a list of names: "Bill E Bob", "Bill Severin", "James Mason", and "Lynia Lounello". A red arrow points to the downward arrow on the right side of the dropdown menu.

The screenshot shows the "Applicant" section of the interface. It consists of a text input field and a blue "+Create New" button. A red arrow points to the "+Create New" button.



Step 6 - Click **SAVE** when all blocks are completed.

A new Permit Number will be generated.

Step 7 – Continue to complete the permit template based on the new application and process the permit to approval.



- What transfers from permit to permit when using the Clone Permit feature?
- The Permit Type (*Until the new permit is SAVED and SUBMITTED – the permit type may be changed*)
 - Building Class Information
 - Contractor Information
 - Valuation
 - Utility Details
 - Building dimensions and features
 - Setbacks
 - Description of work